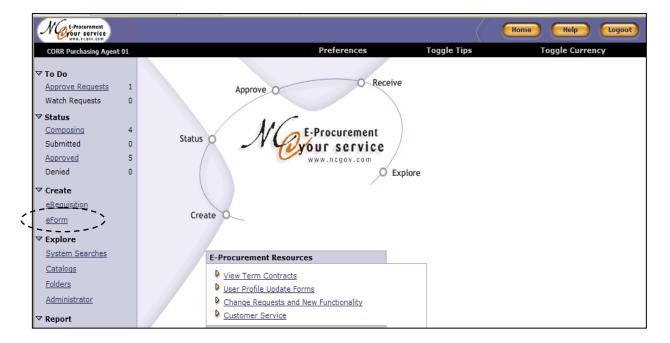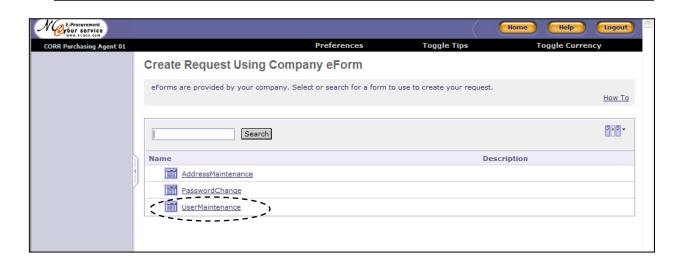# User Maintenance eForm

eForms are electronic forms within NC E-Procurement @ Your Service. They allow Security Administrators to avoid paper processing by directly updating user, address, and password information in the NC E-Procurement system. eForms are easy-to-use pages accessible from the Shortcut Menu on the E-Procurement Home Page. Only Security Administrators and CC/ and LEA EPLite Administrators have access to eForms. This process guide focuses on the User Maintenance eForm. This eForm allows the Security Administrator to add, update, and delete user information for their entity.
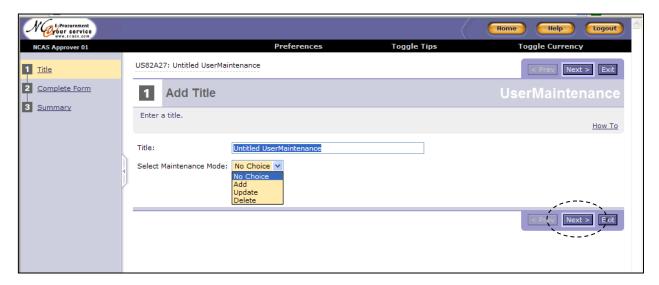
Note: Community College and Local Educational Authorities must take additional steps within their financial systems once the user has been added in E-Procurement. Please refer to the 'Mapping User/Address Information' process guide specific to your financial system for more information.

1. Select the **'eForm'** link from the Shortcut Menu on the E-Procurement Home Page.

2. Select the **'UserMaintenance'** link.

3. **Title –** Enter a title for the User Maintenance request (e.g. 'New User – Jane Doe').

4. **Select Maintenance Mode –** Select the appropriate type of user maintenance to perform.
   Update: Users can update existing user information using update mode. Community College and LEA users can also view a user's Unique ID needed to complete the user mapping by using the update function.
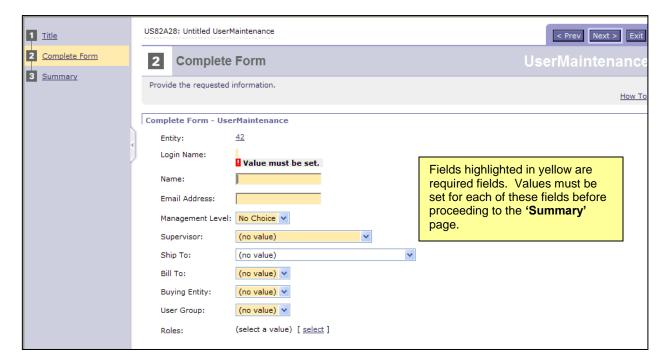   **Add:** Users can add new user information using add mode.
   Delete: Users can delete existing user's that are no longer needed in the system using delete mode.

5. Click **'Next'**.

1.0 User Maintenance – Add Mode

1. **Entity –** The Entity field defaults to the user's entity. This field cannot be modified.

2. **Login Name** -- This field will automatically populate based on the beginning portion of the user's email address (characters before the '@' symbol). Once this user maintenance request form has been submitted, a user's Login Name **cannot** be updated.

Note: The login name for each user within the NC E-Procurement Service is unique. If the login name generated on the user maintenance request form is already in use, the NC E-Procurement Service will automatically append a two digit numeric value to the end of generated login name.

3. **Name –** Enter the user's name.

4. **Email Address –** Enter the user's email address. All E-Procurement email notifications will be sent to this designated address.

5. **Management Level** – Use the dropdown box to select the appropriate management level. The designated management level is used to determine the user's eRequisition approval flow. See the 'Approval Flows' process guide for more information.

6. **Supervisor** – Select the user's E-Procurement supervisor. The selected supervisor must approve all eRequisitions entered by this user.
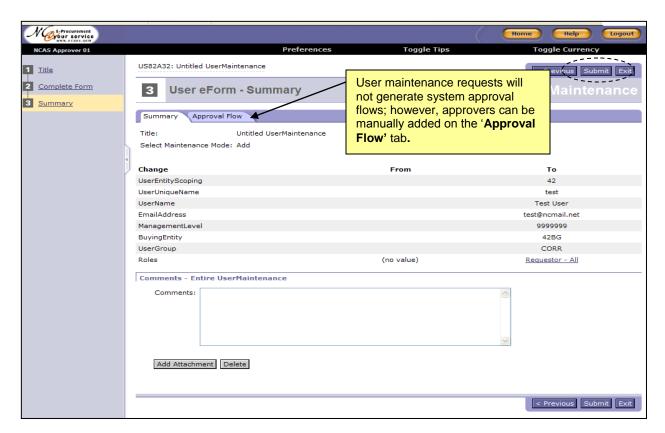
Note: When a user has an unlimited management level (9999999), a supervisor is not required. The user must also have the 'no supervisor' role selected.

7. **Ship To** – Select the default ship to address specific for this user.

8. **Bill To –** Select the default bill to address specific for this user.

9. **Buying Entity (NCAS Users Only) –** Select the default buying entity specific for this user.

    Note: The Ship To, Bill To, and Buying Entity are **default** values. Each of these values may be changed for a specific eRequisition.
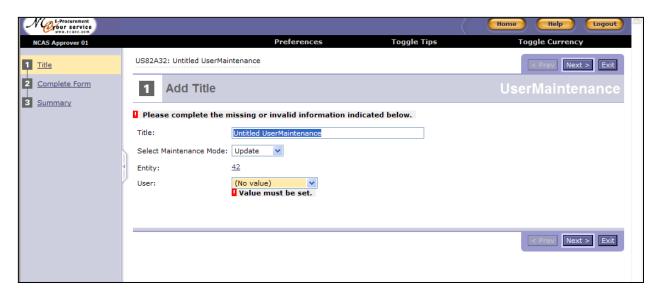
10. **User Group –** Select the user group related to the entity. Most entities will only have one available choice.

11. **Roles –** Use the link labeled, **'Select'** to choose the appropriate roles for each user. See 'Role Definitions' at the end of this section for specific role information.
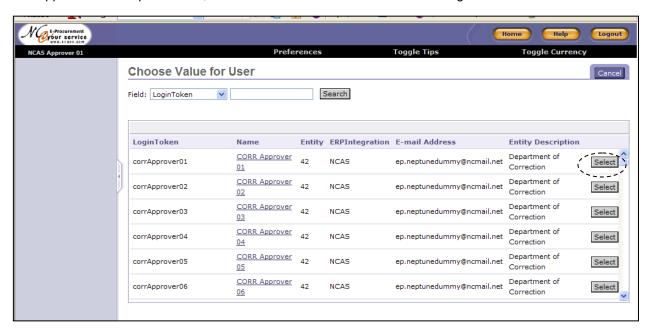
12. Click **'Next.'**

13. Review entered information and add any necessary comments.

14. Click **'Submit.'**

2.0 User Maintenance – Update Mode

1. Use the 'User' dropdown box to select the name of the user being updated. If the user does not appear in the dropdown box, select **'Other…'** and locate the user through a search.

2. Locate the user in the list or use the search field.

Note: The 'Choose Value for User' search field defaults to 'LoginToken.' To search for a user by name, change the search field to 'Name.'

3. Click **'Select'** beside the appropriate user.

4. Make the necessary changes to the user fields.

Note: The 'Entity' and 'Login Name' fields **cannot** be modified.

5. Click **'Next.'**

6. Review the updated information and click **'Submit.'**

Note: User updates are effective immediately after the request is submitted and approved, if necessary.
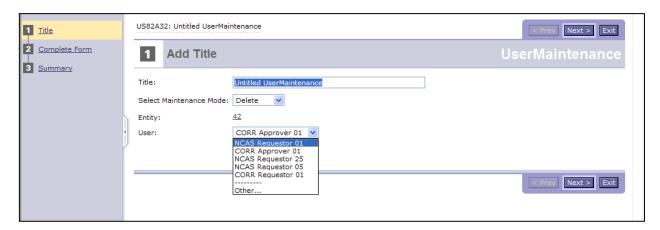
3.0 User Maintenance – Delete Mode

1. **User –** Using the 'User' dropdown box, locate the user to be deleted. If the user is not listed in the dropdown box, select **'Other…'** and locate the user through a search.

2. Review the user information to be deleted.

3. Click **'Next.'**

4. On the Summary screen, click **'Submit.'**

Note: A user cannot be deleted from NC E-Procurement @ Your Service if the user is the only user within their entity assigned to a specific role. The role must be reassigned to another user. For example, if Joe Smith is the only one within his agency with the purchasing agent role, this role must be assigned to another user before Joe can be deleted.

Note: All transactions created by the user must be in a completed state before the user can be deleted. For NCAS users, all purchase orders must be 'Received'. For Community College and LEAs users, all eRequisitions must be 'Approved'. **All** transactions in a 'Composing' or 'Submitted' state must be either deleted or completed before deleting the user.

4.0 Role Definitions

Each user will have a unique login ID with specific roles and permissions associated with it to access NC E-Procurement @ Your Service. The assigned roles are based upon the individual's job functions and responsibilities.

Roles determine a user's authority on the system. Each role has a set of permissions associated with it which determine what functionality and information a given user can access within NC E-Procurement @ Your Service. Each user must have at least one role; however, one role often has several permissions. Below is a list of available roles by entity type and the associated permissions that role contains.

NCAS Agency Roles:

Address eForm: This role gives a user permission to make electronic requests to update address information (additions, removals and updates).
All Delivered Reporting: Users with this role will be able to execute all Ariba reports included in the E-Procurement Service.
Approver: This role gives an individual the authority to approve eRequisitions within an agency.
Chief Procurement Officer: The Chief Procurement Officer is responsible for approving eRequisitions above the agency delegation within their agency. This approver will approve the eRequisition after all other approvers in the supervisor chain have approved the request.
Financial Controller: Users with this role have permission to restrict account code access at the user level.
Purchasing Agent: Users with this role have the permission to source purchases on behalf of the agency for which they work. Purchasing Agents also have the ability to edit catalog item information as well as bypass the approval flow on change orders.
Security Administrator: This user will have the ability to add/delete/update users and addresses for their agency. They will also have access to reset passwords.
Central Receiver: This role allows a user to receive goods/services in NC E-Procurement on behalf of others in their agency. The NC E-Procurement Help Desk must create new central receiver roles.
Inquirer: Allows users to search for and view transactions of others in their agency.
No Supervisor: Users who have this role are allowed to have a NC E-Procurement user profile without a designated supervisor. Users with this role must have a '99999999' management level.
Override Budget Officer: This role allows a designated agency user to override an eRequisition or change order through the system when funds are not available.
Password eForm: This role allows a user to reset passwords for other users within their entity.
Report Maker: Users with this role will be able to execute all Ariba reports included in the E-Procurement Service for all users within their entity.
Requestor-All: This role gives an individual the permission to select catalog, non-catalog and eQuote items for their eRequisition.
Requestor-No eQuote: This role gives an individual the permission to select catalog and non-catalog items for their eRequisition. This role does not give the user permission to use the eQuote tool.
Requestor-Catalog Only: This role gives an individual the permission to only select state term contracts catalog items on an eRequisition. Users with this role do not have permission to add non-catalog items or have access to the eQuote tool.
Requisition Editor: An approver with this role will have the permission to edit an eRequisition in which they are in the approval flow.

Community Colleges/LEA Roles:

EP Lite Administrator: This role can only be assigned to **one** user within each community college/LEA. The EP Lite Administrator has the permission to view all purchase orders created by their entity in their Approved status folder. In addition, this individual receives all error messages resulting from E-Procurement transactions (e.g., Successful Purchase Order Confirmations as well as Failure to Import messages). The EP Lite Administrator can also perform the following functions: add/update/delete user and address information, reset user's passwords, and create all eRequisition types.

Inquirer: Allows users to search for and view transactions of others in their entity.

No Supervisor: Users who have this role are allowed to have a NC E-Procurement user profile without a designated supervisor. Users with this role must have a '99999999' management level.

Purchasing Agent: Users with this role have the permission to source purchases on behalf of the community college/LEA for which they work. Purchasing Agents also have the ability to edit eRequisitions they approve (including the price of catalog items), search on user's work within the NC E-Procurement Service, and create catalog and non-catalog eRequisitions. In addition, the purchasing agent is automatically added as an approver for all non-catalog eRequisitions without a selected supplier and for any eRequisition over the internal delegation threshold.

Requestor-All: This role gives an individual the permission to select catalog, non-catalog and eQuote items for their eRequisition.

Requestor-No eQuote: This role gives an individual the permission to select catalog and non-catalog items for their eRequisition. This role does not give the user permission to use the eQuote tool.

Security Administrator: This user has the permission to add, delete, and update users for their agency. They will also have access to update 'ship to' and 'bill to' addresses as well as reset passwords.